

File Review Form :

Client Name _____ Address _____

Audit Method: NEAT ☐ MHEA ☐ Priority Measures List ☐

At a minimum, the Client File should contain this form and the following forms and data:

Item	Pass	Fail	N/A
Client Intake Data:			
DBA Application and Residence Documents			
Income verification and eligibility			
Fuel Bills			
Assessment FORMS			
Assessment Booklet			
CAZ Forms			
NEAT/MHEA Reports			
REDcalc (ASHRAE 62.2)			
<u>Client Information Booklet:</u>			
General Info			
Homeowner Agreement			
Fuel Release Form			
Mold & Moisture Form			
Lead Hazard Form			
Unvented Space Heater Agreement			
Service Agreement			
Deferral Notification			
Work Plan Data:			
Work Order			
Job Cost Estimate			
Lead Safe Work / Certified Remodeler Form(s)			
Daily CAZ Testing Sheet			
Insulation Certificate			
Job Close-Out Data:			
Final Inspection			
Combustion Appliance Testing			
Client Review Form Signature			
Building Work Report (BWR)			
Job Photos			
Invoices			
Comments:			

QCI Inspector _____ Field Inspection Date _____ File Review Date _____